



PROACT USER GUIDE
PROCUREMENT

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Office of State Procurement Help Desk: (225) 342-8010

Office of State Procurement Help Desk: DOA-OSPHelpDesk@LA.GOV

PROACT Technical Support Help Desk: DOA-OTS-LAPACSupport@LA.GOV

USER LOGIN

The log-in screen will appear as shown below. Follow instructions on the screen to login using your LaGov Personnel Number (same ID used to enter LEO) and your LaGov password. Click **Login**.

[pro]act LA
contract workflow

Please login using your Personnel Number

Personnel Number

Password

Your Personnel Number consists of either a **P** or **M** followed by 8 digits.
For example: **P00012345**.

If you have a **P** number,
you can **reset** or **change** your password using the
LEO Password Maintenance Application

If you have an **M** number,
you can **reset** or **change** your password using the
WULF Password Maintenance Application

HOME SCREEN

The screenshot shows the PROACT Home Screen. At the top left is the [pro]act LA logo with the tagline 'contract workflow'. At the top right, it says 'Welcome DPS User' and 'Department of Public Safety'. Below the logo, there are links for 'home' and 'logout'. The main heading is 'Procurement Requests'. Below this, there are three input fields: 'Transmittal', 'Requisition', and 'Description Keyword', followed by a 'Search' button. A red arrow points to a dropdown menu labeled 'Created'. The dropdown menu is expanded, showing a table of requests. The table has five columns: 'Transmittal #', 'Requisition/Order #', 'Description', 'Agency', and 'Date'. There are two rows of data. Below the table, there are several status buttons: 'Submitted to OSP', 'Assigned to Buyer', 'Returned to Agency for Additional Info', 'Ready to Work', 'Rejected', and 'Awarded'. At the bottom left, there is a link '[+] Add New Request'.

Transmittal #	Requisition/Order #	Description	Agency	Date
29	1321234	Promotional Items	Department of Public Safety	6/9/14
37		microscope	Department of Public Safety	7/9/14

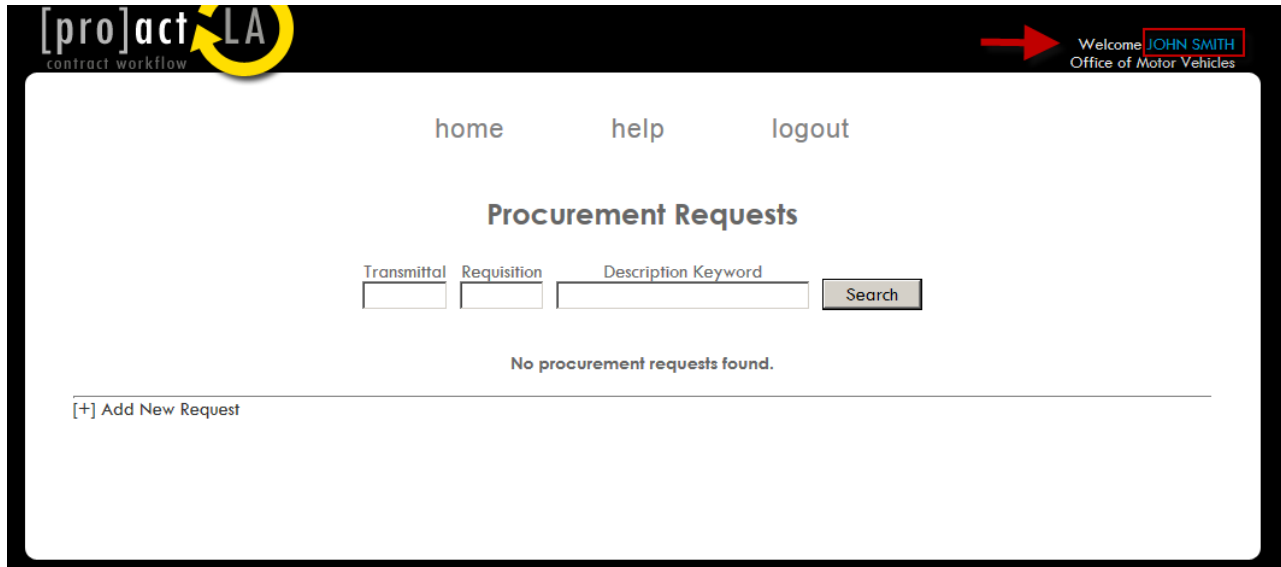
The Home screen displays procurement requests by status:

- **Created** – Requests in progress and saved by agency or end user, but not yet submitted to OSP.
- **Submitted to OSP** – Request with applicable documentation that has been submitted to OSP for initial review and possible further processing.
- **Assigned to Buyer** – Requests that have been assigned to OSP buyer and are under detailed review.
- **Returned to Agency for Additional Info** – Requests that have been returned to the agency for additional information or clarification. If an agency fails to respond to the returned document within 14 calendar days, the request will be rejected resulting in a new request being required.
- **Ready to Work** – Requests that OSP has determined to be ready for further processing. After review, the buyer has determined that all necessary documentation has been received and OSP detailed review and processing in progress.
- **Out on Bid** – Requests that have either been posted to LaPAC for bid or awaiting evaluation of bids received to make an award.
- **Rejected** – Requests that have been marked as rejected have expired. After a request is returned to the agency, State Procurement allows a 14 calendar day turnaround time for the requested information to be provided and resubmitted to OSP. Rejected requests must be cancelled in ISIS and LaGov and recreated. The previous number may not be reused once it has been cancelled but should be referenced with resubmitted new request.
- **Awarded** - When the PO has been issued, OSP will scan and attach the printout of the PO and status will be changed to Awarded. Email notification will be sent to requester to inform that the PO is now available in PROACT for printing at the Agency.
- **Cancelled** – Requests that have been cancelled. These requests will also need to be cancelled in AGPS (or LaGov).

Clicking on the down arrow next to each status will expand the area to display requests at the selected status. If there are no transmittals under a particular status, that status will not display on the Home screen.

Edit User Profile

It is very important that User Profile information is correct in PROACT. This information will be used for email notifications as well as contact by phone if necessary to discuss the status of a request.



[pro]act LA
contract workflow

home help logout

Welcome JOHN SMITH
Office of Motor Vehicles

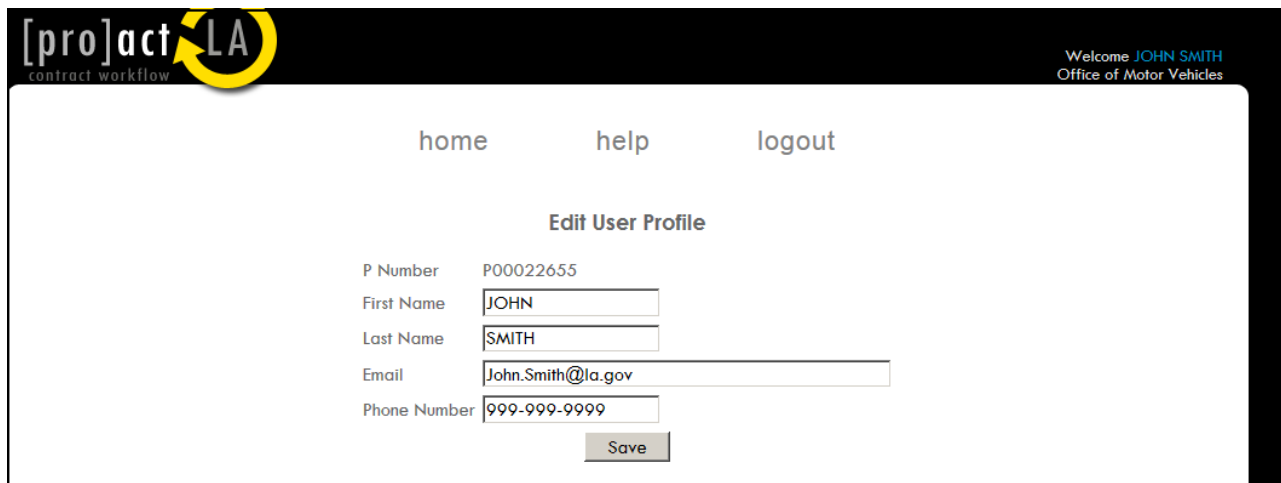
Procurement Requests

Transmittal Requisition Description Keyword Search

No procurement requests found.

[+] Add New Request

To modify contact information, click on the link containing your name, and the Edit User Profile screen will appear.



[pro]act LA
contract workflow

home help logout

Welcome JOHN SMITH
Office of Motor Vehicles

Edit User Profile

P Number P00022655

First Name JOHN

Last Name SMITH

Email John.Smith@la.gov

Phone Number 999-999-9999

Save

Edit contact information and **Save**.

Create a New Request

[pro]actLA

contract workflow

Welcome DPS User
Department of Public Safety

home

logout

Procurement Requests

Transmittal

Requisition

Description Keyword

Search

▼ Created

Transmittal #	Requisition/Order #	Description	Agency	Date
29	1321234	Promotional Items	Department of Public Safety	6/9/14
37		microscope	Department of Public Safety	7/9/14

▶ Submitted to OSP

▶ Assigned to Buyer

▶ Returned to Agency for Additional Info

▶ Ready to Work

▶ Rejected

▶ Awarded

➔

[+] Add New Request

Click on the **[+] Add New Request** link.

The Procurement Documentation Submittal screen will display. Enter applicable information.

- **Date** – Creation Date is the default. The system will automatically insert this date.
- **From** – User and Department generating the request based on the personnel number of the employee entering the request.
- **Contact Information** - Contact Information of the person that submitted the request to OSP (based upon login ID of person submitting to OSP).
- **Org Unit** – Organization unit for the request. An Org Unit must be selected in order to save the request.
- **LaGov/ISIS Number** – Required. LaGov (RFx or Shopping Cart) or ISIS (requisition, solicitation or PO) reference number. Submitter should check this number carefully to make sure it matches the LaGov/ISIS number.
- **Resubmittal** – Click this checkbox if this is a new procurement document submittal that is following a rejected request.
- **Previous Number** – If this is a Resubmittal, select the previously rejected requisition, PO, solicitation, RFx or shopping cart number for reference.
- **Brief Description** – Required. 30 character short description.
- **Requisition Amount** – Required.
- **Current Status** – Displays current status. Click on [View History] for historical dates/times of workflow statuses.
- **Type of Procurement** – Required. One of these must be selected in order to submit to OSP.
 - One Time Buy: One time purchase of goods; does not contain a repurchase clause and no increase/decrease is allowed.
 - Service/Maintenance/Blanket Order: Service/Maintenance is a purchase of ongoing service or maintenance for a certain period of time; Blanket Order is a purchase of goods wherein more than one (1) delivery can be made during a specified period of time.
- **LaGov Capital Asset (Yes/No)** - Only LaGov agencies will see this option, and one of these must be selected. Select “Yes” if you are purchasing an item that is classified as tangible, non-consumable, moveable property, over \$5,000, that will be owned by your agency.
- **Special Conditions** – If any of these checkboxes are selected, the submittal form will expand to request additional supporting documentation (see [Procurement Handbook](#) for information). If this documentation is not provided, the Office of State Procurement will return to the Agency for additional information.
 - Sole Source Purchase
 - Proprietary Purchase
 - Authorized Dealer Repair or Parts
 - Renewal/Repurchase
 - Change Order
 - Exempt per Small Purchase Executive Order
 - RFP
 - Vehicles
 - Labor & Materials Project/Construction
 - Printing

Supporting Documentation

LaGov Agencies

Select any Special Conditions that apply to your request (if applicable). Confirm that all required documentation has been attached in LaGov by selecting the **Uploaded in LaGov** checkboxes. If this information has not been provided in LaGov, the request will be returned to the Agency.

Example for LaGov Agencies:

The screenshot shows a web form titled "Procurement Documentation Submittal". It contains the following fields and options:

- Date:** Thursday, November 13, 2014
- From:** Jane Doe [Department of Wildlife and Fisheries]
- Contact Information:** 225-765-2875 | Jane.Doe@la.gov
- Org Unit:** 50010547 - OFFICE MANAGEMENT & FINANCE
- LaGov Number:** 1000000099
- Resubmittal:** ☐ Previous Number: []
- Brief Description:** Patrol Boat (19 Characters Remaining)
- Requisition Amount:** 15000.00
- Type of Procurement:** ☒ One Time Buy ☐ Service/Maintenance/Blanket Order
- Special Conditions:** If applicable, select any of the options below that also apply to your purchase over \$5,000.
 - ☐ Sole Source Purchase
 - ☐ Authorized Dealer Repair or Parts
 - ☐ Change Order
 - ☐ RFP
 - ☐ Labor & Materials Project/Construction
 - ☐ Proprietary Purchase
 - ☐ Renewal/Repurchase
 - ☐ Exempt per Small Purchase Executive Order
 - ☐ Vehicles
 - ☐ Printing
- Required Documentation:**
 - Purchases Over \$5,000**
 - * Cost estimate (if available) from recommended vendor to include the name, address, and contract information
 - * Detailed specifications
- Uploaded in LaGov:** ☒ ☒

At the bottom are two buttons: "Save" and "Save & Submit to OSP".

After all required documentation has been entered into PROACT, the request can be saved.

If the following required information exists, the request can be submitted to OSP.

- Org Unit
- ISIS Number
- Brief Description
- Requisition Amount

Important Note: PROACT provides information related to all supporting documentation that needs to be included in the request. It is acceptable to provide all information in one attachment in LaGov if necessary.

- **Save** – will save any information. After saving the submittal, it will remain in Created status until submitted to OSP.
- **Save and Submit to OSP** – will submit the request to OSP for review. In order to submit to OSP, an ISIS or LaGov requisition, PO, solicitation, RFx or Shopping Cart number must be assigned, description entered, and Estimated Purchase Amount must be entered. When this action is performed, the request will move to Submitted to OSP status and can no longer be edited by the Agency.
- **Delete** – This option is only available prior to a request being submitted to OSP.

Non-LaGov Agencies

Select any Special Conditions that apply to your request (if applicable). Provide attachments of information requested. If this information is not provided, the request will be returned to the Agency.

Example for Non-LaGov Agencies:

Type of Procurement: ☐ One Time Buy ☐ Service/Maintenance/Blanket Order

Special Conditions: If applicable, select any of the options below that also apply to your purchase over \$5,000.

<input type="checkbox"/> Sole Source Purchase	<input type="checkbox"/> Proprietary Purchase
<input type="checkbox"/> Authorized Dealer Repair or Parts	<input type="checkbox"/> Renewal/Repurchase
<input type="checkbox"/> Change Order	<input type="checkbox"/> Exempt per Small Purchase Executive Order
<input type="checkbox"/> RFP	<input type="checkbox"/> Vehicles
<input type="checkbox"/> Labor & Materials Project/Construction	<input type="checkbox"/> Printing

Required Documentation

Purchases Over DPA

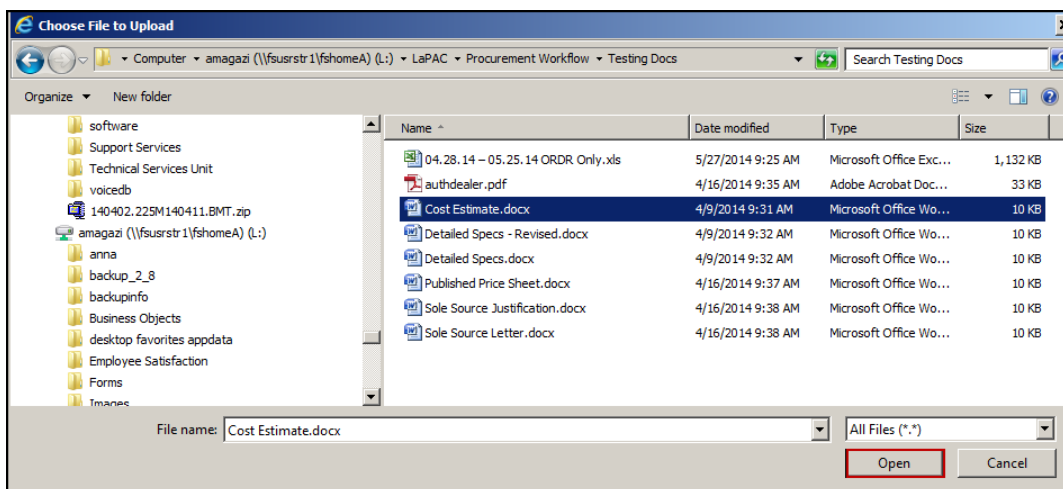
- Cost estimate (if available) from recommended vendor to include the name, address, and contact information
- Detailed specifications

Other Attachments

Description

File Uploaded

To attach supporting documentation, click on the **Browse** button.



Select the file and click **Open**.

After all required documentation has been entered into PROACT, the request can be saved. After saving the transmittal, attachments will appear as shown below. Prior to submitting to OSP, there will be an option to delete attachments. However, after submitting to OSP for review, all attachments will remain in PROACT for historical purposes.

The screenshot shows the PROACT web application interface. At the top, there is a navigation bar with links for 'home', 'users', 'help', and 'logout'. Below this is a submittal form titled 'Procurement Documentation Submittal [Transmittal# 300]'. The form contains the following fields and options:

- Date:** Thursday, November 13, 2014
- From:** John Smith [Department of Public Safety]
- Contact Information:** 225-342-7075 | John.Smith@la.gov
- Org Unit:** 50010286 - JETSON CENTER FOR YOUTH
- ISIS Number:** 123457
- Brief Description:** Prison Maintenance Equipment (2 Characters Remaining)
- Requisition Amount:** 10000.00
- Current Status:** Created
- Type of Procurement:** ☒ One Time Buy ☐ Service/Maintenance/Blanket Order
- Special Conditions:** If applicable, select any of the options below that also apply to your purchase over \$5,000.
 - ☐ Sole Source Purchase
 - ☐ Authorized Dealer Repair or Parts
 - ☐ Change Order
 - ☐ RFP
 - ☐ Labor & Materials Project/Construction
 - ☐ Proprietary Purchase
 - ☐ Renewal/Repurchase
 - ☐ Exempt per Small Purchase Executive Order
 - ☐ Vehicles
 - ☐ Printing
- Required Documentation:**
 - Purchases Over \$5,000:**
 - Cost estimate (if available) from recommended vendor to include the name, address, and contact information:** [Browse...]
 - Detailed specifications:**
 - File:** Cost Estimate.docx [delete] **Uploaded:** 11/13/14 5:29:58 PM (John Smith) [Browse...]
 - File:** Detailed Specifications.docx [delete] **Uploaded:** 11/13/14 5:29:58 PM (John Smith) [Browse...]
 - Other Attachments:** [Description] [Browse...]

At the bottom of the form, there are three buttons: 'Save', 'Save & Submit to OSP', and 'Delete'.

If the following required information exists, the request can be submitted to OSP.

- Org Unit
- ISIS (or your applicable Requisition/PO) Number
- Brief Description
- Requisition Amount

Important Note: PROACT provides information related to all supporting documentation that needs to be included in the request. It is acceptable to provide all information in one attachment if necessary.

Submitted to OSP Status

To view requests submitted to OSP, go to Home page and click on the arrow to expand the area under that status.

The screenshot shows the PROACT LA interface. At the top, there's a header with the logo and a welcome message for 'DPS User'. Below the header, there are navigation links for 'home' and 'logout'. The main section is titled 'Procurement Requests'. It features a search bar with tabs for 'Transmittal', 'Requisition', and 'Description Keyword'. Below the search bar, there's a list of status categories: 'Created', 'Submitted to OSP', 'Assigned to Buyer', 'Returned to Agency for Additional Info', and 'Ready to Work'. The 'Submitted to OSP' category is selected, and a table of requests is displayed. The table has columns for Transmittal #, Requisition/Order #, Description, Agency, and Date. A red arrow points to the 'Submitted to OSP' status category.

Transmittal #	Requisition/Order #	Description	Agency	Date
21	1351260	fires	Department of Public Safety	6/4/14
22	1354697		Department of Public Safety	6/4/14
23	1352145	Police supplies	Department of Public Safety	6/9/14
24	1390001	bullets	Department of Public Safety	6/5/14
25	1390002	uniforms	Department of Public Safety	6/5/14
26	1354600	1131313131313	Department of Public Safety	6/9/14
27	1354601	Tractor parts	Department of Public Safety	6/10/14
28	1394600	Promotional Items	Department of Public Safety	6/9/14
31	1352456	Security Services	Department of Public Safety	6/10/14
34	1358825	Testing from tina	Department of Public Safety	6/10/14

Showing 1 to 10 of 12 records

If the request has not yet been assigned to a buyer, it will display under this status. Select a request to review, and the Procurement Documentation Submittal screen will display.

Submittal Tab

This tab contains the information submitted by the Agency.

The screenshot shows the 'Procurement Documentation Submittal' screen for Transmittal# 281. The 'submittal' tab is selected. The screen displays the following information:

- Date:** Thursday, November 6, 2014
- From:** Jane Doe [-]
- Contact Information:** N/A
- Org Unit:** 60010347 - OFFICE MANAGEMENT & FINANCE
- LeGov Number:** 1900003 | Resubmittal: [] Previous Number: []
- Brief Description:** Training Room equipment
- Requisition Amount:** \$6,000.00
- Current Status:** Submitted to OSP

Assigned To: Not Assigned

Type of Procurement: ☒ One Time Buy ☐ Service/Maintenance/Blanket Order

Special Conditions: If applicable, select any of the options below that also apply to your purchase over \$5,000.

- ☒ Sole Source Purchase
- ☒ Authorized Dealer Repair or Parts
- ☒ Change Order
- ☒ RFP
- ☒ Labor & Materials Project/Construction
- ☐ Proprietary Purchase
- ☐ Renewal/Repurchase
- ☐ Exempt per Small Purchase Executive Order
- ☐ Vehicles

Checklist Tab

This tab contains the Procurement Documentation Checklist maintained by the Office of State Procurement. If a request is submitted with incomplete documentation, it will be Returned to the Agency by OSP. This checklist will provide details pertaining to the information that is incomplete.

The screenshot displays the PROACT Procurement User Guide interface. At the top left is the [pro]act LA logo with the tagline 'contract workflow'. At the top right, a welcome message reads 'Welcome Jane Doe, Department of Wildlife and Fisheries'. Below the header is a navigation bar with links for 'home', 'users', 'help', and 'logout'. A secondary navigation bar contains tabs for 'submittal', 'checklist', 'comments', and 'history', with 'checklist' highlighted by a red box. The main content area is titled 'Procurement Documentation Checklist [Transmittal# 281]'. It includes a header section with the following details: Date: Thursday, November 13, 2014; To: []; From: Office of State Purchasing; Subject: Incomplete Documentation; LaGov Number: 1900003; Buyer: --; and Current Status: Submitted to OSP. A paragraph of text states: 'The supporting documentation for the requisition listed above is incomplete and requires your immediate attention. Please submit the documentation required below within 14 calendar of receiving this request. If documentation is not received within 14 calendar days, the requisition will be rejected. Once rejected, the requisition may not be resubmitted. A new requisition/approval process is required upon resubmittal.' Below this text is a list of required documentation items, each preceded by a checkbox: 'Over \$5,000', 'Signed and dated quote from the suggested vendor reflecting a firm, fixed price.', 'Detailed specifications.', 'Sole Source Documentation', 'Firm, fixed price quote', 'Published price sheet from the vendor', 'Sole source letter from vendor indicating the unique feature(s) of the product and the fact that there are no distributors for the product', 'Sole source justification letter from Agency Head or designee', 'Proprietary Purchase Documentation', 'Proprietary justification letter from Agency Head or designee', 'Authorized Dealer Repair or Parts', 'Firm, fixed price quote', 'Authorized Dealer form', 'Renewal/Repurchase', 'Previous P.O.', 'OSP Tracking Form', 'Bid/Addenda', 'Change Order', 'Back-up documents', 'Exempt per Small Purchase Executive Order', and 'Exemption Number'.

[pro]act LA
contract workflow

Welcome Jane Doe
Department of Wildlife and Fisheries

home users help logout

submittal **checklist** comments history

Procurement Documentation Checklist [Transmittal# 281]

Date: Thursday, November 13, 2014
To: []
From: Office of State Purchasing
Subject: Incomplete Documentation
LaGov Number: 1900003
Buyer: --
Current Status: Submitted to OSP

The supporting documentation for the requisition listed above is incomplete and requires your immediate attention. Please submit the documentation required below within 14 calendar of receiving this request. If documentation is not received within 14 calendar days, the requisition will be rejected. Once rejected, the requisition may not be resubmitted. A new requisition/approval process is required upon resubmittal.

- ☐ Over \$5,000
- ☐ Signed and dated quote from the suggested vendor reflecting a firm, fixed price.
- ☐ Detailed specifications.
- Sole Source Documentation**
 - ☐ Firm, fixed price quote
 - ☐ Published price sheet from the vendor
 - ☐ Sole source letter from vendor indicating the unique feature(s) of the product and the fact that there are no distributors for the product
 - ☐ Sole source justification letter from Agency Head or designee
- Proprietary Purchase Documentation**
 - ☐ Proprietary justification letter from Agency Head or designee
- Authorized Dealer Repair or Parts**
 - ☐ Firm, fixed price quote
 - ☐ Authorized Dealer form
- Renewal/Repurchase**
 - ☐ Previous P.O.
 - ☐ OSP Tracking Form
 - ☐ Bid/Addenda
- Change Order**
 - ☐ Back-up documents
- Exempt per Small Purchase Executive Order**
 - ☐ Exemption Number

Comments Tab

This tab serves as a means of communication between the Agency and the Office of State Procurement. Any important information that needs to be communicated should be entered into PROACT. It is preferred that communication is posted in the PROACT system rather than via email for future reference purposes.

IMPORTANT NOTE: Comments cannot be edited or deleted after the **Post Comment** or **Post Comment and Send Email** buttons are selected.

The screenshot shows the PROACT system interface with the 'comments' tab selected. The header includes the [pro]act LA logo, a welcome message for 'Suzie DCFSSISSEnter', and navigation links for 'home', 'help', and 'logout'. Below the header are tabs for 'submittal', 'checklist', 'comments' (highlighted), and 'history'. The main content area is titled 'Comments [Transmittal# 73]' and contains a table with one row of comment data. Below the table is a text input field labeled 'Add a comment:' and two buttons: 'Post Comment' and 'Post Comment and Send Email'.

Comment	Posted By	Posted On
Spoke to Mary Smith at OSP on 9/25.	Suzie DCFSSISSEnter	9/25/14 4:06:46 PM

- **Post Comment** – will post comment without sending email notification.
- **Post Comment and Send Email** – If comment is entered by Agency personnel, email will be sent to OSP personnel to notify that a comment has been entered into PROACT for the transmittal. If the comment is entered by OSP personnel, email will be sent to the requestor using email address in User Profile.

History Tab

This tab contains information related to the different statuses of the request.

These statuses and historical dates/times will be used for Upper Management's reporting purposes to track the efficiency of procurement processes.

The screenshot shows the PROACT system interface with the 'history' tab selected. The header includes the [pro]act LA logo, a welcome message for 'DPS User', and navigation links for 'home' and 'logout'. Below the header are tabs for 'submittal', 'checklist', 'comments', and 'history' (highlighted). The main content area is titled 'Requisition: 1352145 [Department of Public Safety]' and contains a table with two rows of action history.

Action	Assigned To	Logged By	Date
Created	--	Tara Pocreello	6/4/2014 11:47:01 AM
Submitted to OSP	--	Tara Pocreello	6/9/2014 8:50:46 AM

Assigned to Buyer Status

After initial review to ensure that supporting documentation is included with a procurement request, the request will be assigned to a buyer in the Office of State Procurement and status will be changed to Assigned to Buyer.

Returned to Agency for Additional Info Status

It is important to ensure that any requests that have been Returned to Agency for Additional Information are handled in a timely manner.

The screenshot shows the PROACT LA contract workflow interface. At the top, there is a navigation bar with 'home' and 'logout' links. Below this is a section titled 'Procurement Requests'. Under this section, there are three input fields: 'Transmittal', 'Requisition', and 'Description Keyword', followed by a 'Search' button. Below the search fields, there is a list of status options: 'Created', 'Submitted to OSP', 'Assigned to Buyer', and 'Returned to Agency for Additional Info'. A red arrow points to the 'Returned to Agency for Additional Info' option. Below this option, a table displays a list of requests.

Transmittal #	Requisition/Order #	Description	Agency	Assigned To
18	1351251	badges	Department of Public Safety	Hilary Stephens
19	1351252	Alarm Service	Department of Public Safety	Hilary Stephens

Open the returned request and the Procurement Documentation Submittal screen will display. Review all tabs of information and edit request to include the additional information. When all edits are complete, click the **Save & Submit to OSP** button to resubmit. If the request has been assigned to a buyer, the status of the request will be updated to Submitted to OSP and the assigned buyer at the Office of State Procurement will receive notification that the request is available for further review.

Important Note for LaGov agencies – If a request is Returned to Agency for Additional Info, an option will be provided to attach any requested information in PROACT, since LaGov does not provide this capability after an RFX has been submitted to OSP. If you are not able to attach in LaGov, attaching in PROACT is preferred so that all documentation related to the request is in either LaGov or PROACT.

Ready to Work Status

Requests that OSP has determined to be complete and ready for processing will be set to Ready to Work status.

Out on Bid Status

Requests that have either been posted to LaPAC for bid or awaiting evaluation of bids received to make an award.

Rejected Status

Requests that have been marked as rejected have expired. After a request is returned to the agency, State Procurement allows a 14 calendar day turnaround time for the requested information to be provided and

resubmitted to OSP. Rejected requests must be cancelled in ISIS and recreated. The previous requisition/RFx number may not be reused once it has been cancelled but should be referenced when submitting a new request.

Awarded Status

When the PO has been issued, OSP will scan and attach the printout of the PO and status will be changed to Awarded. Email notification will be sent to requester to inform that the PO is available in PROACT for printing at the Agency.

Cancelled Status

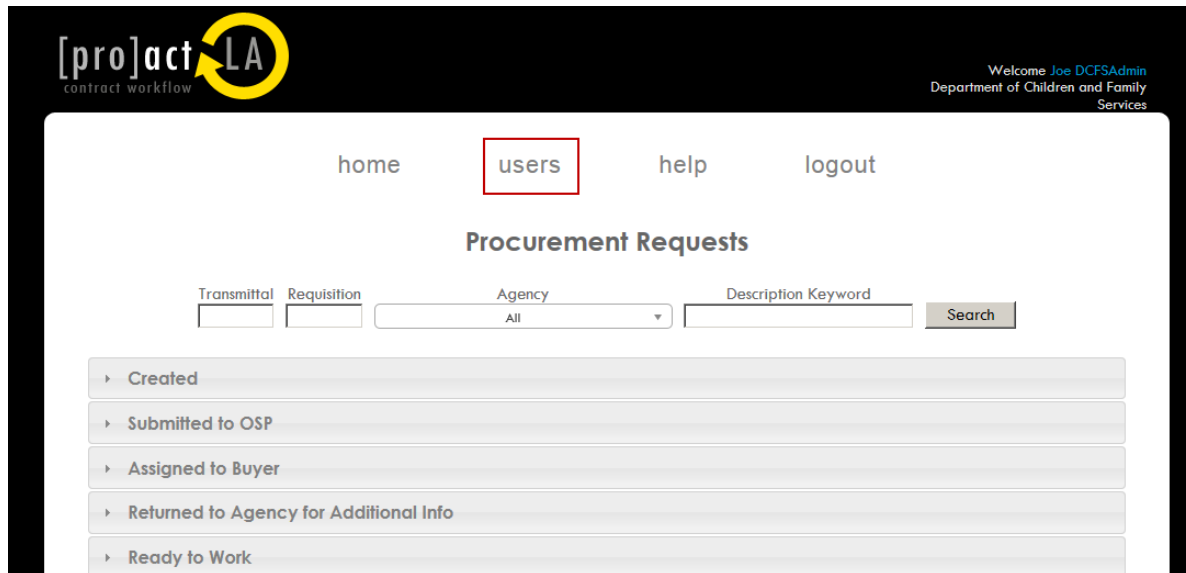
Requests that have been cancelled.

AGENCY ADMINISTRATOR

Agency Administrators have the ability to maintain user information for all agencies within their department.

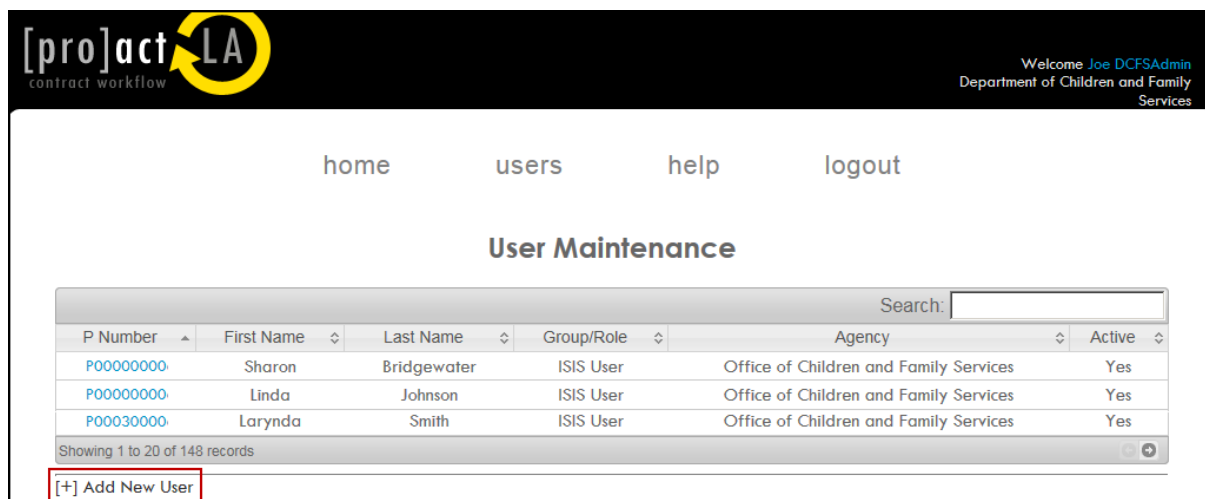
Maintain Users

It is very important that User Profile information is correct in PROACT. This information will be used for email notifications as well as contact by phone if necessary to discuss the status of a request.



To Maintain Users, click on the **Users** link at the top of the Home page.

The User Maintenance screen will display. To add a new user, click on the **[+] Add New User** link at the bottom of the screen.



The Add User screen will display. Enter User Information.

- **Department Liaison checkbox** – If this is selected, this person will receive email notification (in addition to the person that submitted the request) if any transmittals are either Returned to Agency or Rejected by the Office of State Procurement.

The screenshot shows the 'Add User' form in the PROACT system. The form is titled 'Add User' and is located under the 'users' tab in the navigation bar. The form includes the following fields:

- P Number: 999999998
- First Name: Jane
- Last Name: Doe
- Email: Jane.Doe@la.gov
- Phone Number: 999-999-9999
- Department Liaison: ☐
- Agency: Off of Community Services (dropdown menu)
- Additional Agency Orgs (Multiple may be chosen): Choose an Agency...

Agency and Organizational Unit Selection

The screenshot shows the 'Agency and Organizational Unit Selection' section. It includes a dropdown menu for 'Agency' set to 'Office of Children and Family Services'. Below this, there are two buttons for 'Additional Agency Orgs': 'Office of the Secretary' and 'Rehabilitation Services'. The 'Available' section lists the following organizational units:

- Office of Children and Family Services
- 50010617 - BUREAU OF RESIDENTIAL LICENSIN
- 50010619 - MANAGEMENT AND FINANCE DIVISIO
- 50010623 - MFD - APPEALS
- 50010624 - EX - AUDIT & COMP SVC
- 50010626 - EX - BUR OF EXEC COUNSEL

The 'Selected' section is currently empty.

- **Agency** – Use the dropdown arrow to select an Agency that contains Organizational Units that the user should have permission to access. After selecting an Agency, the Organizational Units for that Agency will display at the bottom of the screen in the “Available” section.
- **Additional Agency Orgs** – Once an Agency has been selected, additional agencies can be selected if necessary. As additional agencies are selected, the organizational units for those agencies will also display in the “Available” section.

If the user should be allowed to access to all organizational units within the agency, click on the agency name, and all organizational units for that agency will move to the “Selected” section at the bottom of the screen.

If only the organizational unit is selected, it will move to the “Selected” section of the screen.

To deselect Agencies/Orgs, click on the Agency or Org unit in the “Selected” section, and it will move back to the “Available” section.

When all desired Organizational Units have been moved to the “Selected” section, click the **Save** button.